

Angela M. Thomson, CFP[®]
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FORM ADV PART 2B. BROCHURE SUPPLEMENT

This brochure supplement provides information about Angela Thomson that supplements the Coastal Financial Planning, Inc. brochure. You should have received a copy of that brochure. Please contact us at 401-727-8151 if you did not receive Coastal Financial Planning, Inc. brochure or if you have any questions about the contents of this supplement.

Additional information about Angela Thomson is also available on the SEC's website at www.adviserinfo.sec.gov. The searchable IARD/CRD number for Angela Thomason, Inc. is 3028775.

Angela M. Thomson, CFP®

Item 2 – Educational Background and Business Experience

Angela M. Thomson was born in 1958. Ms. Thomson has been the owner of Coastal Financial Planning, Inc. since February 1997.

Education

- Bryant College, B.S Business Administration, 1979
- Northeastern University, Certified Financial Planner Program
- Certified Financial Planning Licensing attained – 2000

Item 3 – Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this item.

Item 4 – Other Business Activities

Ms. Thomson has no other financial industry activities or affiliations.

Item 5 – Additional Compensation

Ms. Thomson has no information applicable to this item.

Item 6 – Supervision

As Angela M. Thomson is the only adviser employed by Coastal Financial Planning, Inc., she is the supervisor.

Item 7 – Requirements for State-Registered Advisers

Disciplinary Information

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this item. There are no criminal or civil actions, administrative enforcement proceedings, self-regulatory organizations enforcement proceeding or any other proceedings applicable to the firm or Ms. Thomson.

Other Business Activities

Ms. Thomson is not registered nor has an application pending to register as a registered representative of a broker/dealer or associated person of a futures commission merchant, commodity pool operator, or commodity trading adviser. As a result, Ms. Thomson does not receive commissions, bonuses or other compensation based on the sale of securities or other investment products, including that as a registered representative of a broker/dealer and including distribution of service (trail) fees for the sale of mutual funds.

Ms. Thomson is a Certified Financial Planner™ and a member of the NAPFA, FPA and registered with the Certified Financial Planning Board of Standards, Inc.

The CERTIFIED FINANCIAL PLANNER™, CFP® AND FEDERALLY REGISTERED CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 73,000 individuals have obtained the CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- **Education** – Complete an advanced college-level course of study addressing the financial planning subject areas the CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent foreign university). CFP Boards’ financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination includes multiple-choice questions, including stand-alone questions and sets of questions associated with short scenarios or more lengthy case histories;
- **Experience** – Complete at least three years of full-time financial planning-related experiences (or the equivalent, measured as 2,000 hours per year); and
- **Ethics** – Agree to be bound by the CFP Boards’ *Standards of Professional Conduct*, a set of documents outline the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- **Continuing Education** – Complete 30 hours of continuing education hours every year, inclusive of two hours of the *Code of Ethics* every two years and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- **Ethics** – Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to the CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.